

FORMS MANAGEMENT CHECK LIST 6 Jan. 1959

1. Is Forms Management included as an element of the component's Records Management Program?

2. Is the ARO familiar with

STAT

3. Does the ARO have a copy of the CIA Forms Management Program Booklet (Tab A)?

~~Has he read and does he understand it?~~

Have other officials seen the booklet?

4. Does the ARO have a copy of

STAT

~~Has he read and does he understand it?~~

5. Has an office directive been issued on the component's Forms Management Program (Example: Tab C, LI 43-100-1)?

If so, does it provide for clearance of all forms requirements by:

.The Area Records Officer?

.Other component officials?

.Forms Management Branch?

6. If no directive has been issued, what practice is followed by the component in handling forms requirements?

7. Are requesters helped by the ARO to complete Form 30 (Tab D), or does the ARO fill it out himself?

Do all those who complete the form understand it?

Does anyone have any complaints about it or suggestions for its improvement?

8. Indicate how thorough a review is made of requests for new and revised forms by:

.Key approving officials?

.Area Records Officer?

.Are either of these reviews of the "rubber stamp" variety?
If so, why?

9. Do the ARO and other officials understand fully the purposes and use of Form 30a (Tab E)?

Are there any complaints about it, or suggestions for its improvement?

10. Has the ARO participated in any FMB Form Status Surveys (Tab F)?

Are replies made promptly? *What replies*

If they have been slow, what are the reasons?

Do forms originators cooperate in these surveys?

Do they understand the importance of these surveys as a means of cleaning out "forms dead wood"?

11. Does the component receive one or more copies of the latest forms indexes?

.Numerical?

.Alphabetical?

.Functional?

Are these indexes being used?

Are they of any real value to the user?

Is the format adequate?

Is it distributed often enough?

Are enough (or too many) copies distributed?

12. Are there any evidences of uneconomical forms and related procedures-systems?

.Too many copies?

.Duplicate and overlapping forms?

.Need for mechanized systems?

.Need to revert from over-mechanized systems to simpler manual systems?

.Forms and procedures too complex?

.Lack of adequate instructions or procedures manuals?

13. Are specialty-type forms being used?
 - .Too widely?
 - .Not Enough?
 - .Explain!
14. Have any serious forms supply problems been encountered in the past year?
 - Have they all been corrected?
 - What suggestions are offered for improvement?
15. Are any bootleg forms in use in the component?
 - (If so, collect 5 sample copies of each. Write on 1 copy, name of the OPI, name, room and telephone no. of the person most familiar with the form; ~~clip or staple each set together, and submit with report.~~)
16. Is bootlegging being done on equipment controlled by the component or by PSD?
17. Has any attempt ever been made to control bootlegging?
 - If not, why not?
18. What reasons are most commonly advanced by forms bootleggers for their actions?
 - .Convenience (time, lack of paperwork, etc.)?
 - .Infrequent or small need; one-time, test or experimental use?
 - .Dissatisfaction with ARO?
 - .Dissatisfaction with FMB?
 - .Dissatisfaction with PSD?
 - .Other?
19. What is the attitude of the Area Records Officer ~~towards~~ forms and forms management?
20. What are the attitudes of key officials towards forms management?
 - .Indifferent?
 - .Dislike?
 - .Interested?